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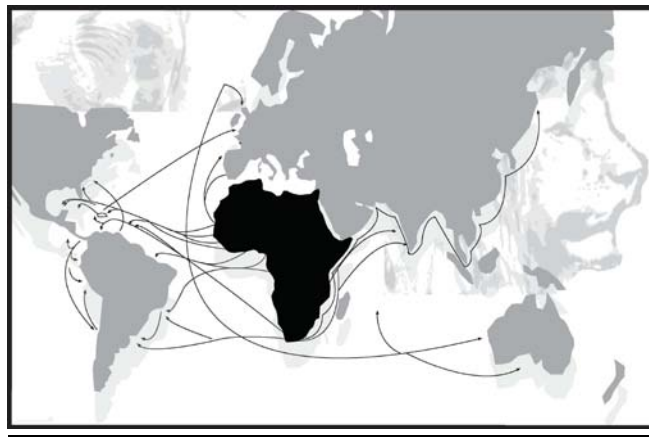
*“Race and Class in Colonial Mexico: An Overview of the Literature”*

*(Working Paper 012)*

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## **Abstract**

### **Race and Class in Colonial Mexico—An Overview of the Literature**

My paper evaluates historiography in colonial Mexican history, focusing on the specific contributions scholars have made in the discussion of the role of race and class within colonial Mexican society. Looking at identity construction and social stratification, one group of scholars argue that race is more important in the operation of these two social processes; while other scholars argue that class is more important. However, there is a third group of scholars within the debate who have taken unique positions. These historians, all who are writing more recent scholarship, move the debate forward, offering alternative explanations for the processes of identity construction and social ranking beyond the traditional race or class explanation. The debate becomes much more complex with the introduction of patriarchialism, gender, different social spaces, or the idea of social race. My paper proposes that patriarchy and social race, defined by shared experiences, were the most important determinants of identity construction and social stratification.

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Two social processes define an individual's place in society as a whole: identity construction and social stratification. These processes are not only defined by an individual's perception of themselves and their status within society, but also by how the social structure classifies them and how figures of authority and their peers perceive them. Often identity construction is contested and obtaining privilege is complex. Social interaction requires constant negotiation; "Did such negotiation take place once in a lifetime, or was in an ongoing process?"<sup>1</sup> It is important to understand how identity is constructed and privilege is obtained because it allows for a greater understanding of the everyday working of past societies. It reveals information about relationships between different groups within a society, especially between those with power, money or prestige and those without, and it often gives a voice to the voiceless; those at the bottom of society's social rankings who then appear as active participants in history.

In a quest to define these two processes, L. N. McAlister's article "Social Structure and Social Change in New Spain" in 1963 begins the race versus class debate in historiography.<sup>2</sup> McAlister looks at the evolution of the estates system into the *sistema de las castas* in New Spain. McAlister argues that race in the form of the *sistema de las castas* influenced identity construction and social stratification. Following McAlister's article, an attempt to understand identity construction and social stratification in colonial Mexico ensued, and historians have engaged in a debate, which has solidified around two general explanations. One group of historians argues that race was more important in the operation of these two processes; the revisionist group argues that economic class was more important. This essay offers a third group of historians who have taken unique debate positions. These historians, all who are writing more recent scholarship, move the debate forward, offering alternative explanations for the processes of identity construction and social ranking beyond the traditional race or class explanation. This essay proposes that patriarchy and social race, defined by shared experiences, were the most important determinants of identity construction and social stratification.

Framing the debate, the growth of colonial Mexican society develops from the sixteenth century up until the early nineteenth century. Though many historians survey this entire period,

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<sup>1</sup> Patrick Carroll, "Negotiating Identity Across New Spain's Social Trinity," In *New Spain's Social Trinity* (Austin: University of Texas Press, forthcoming 2009), 2.

<sup>2</sup> L.N. McAlister, "Social Structure and Social Change in New Spain." *The Hispanic American Historical Review*, vol. 43, no. 3 (August, 1963): 349-370.

the emphasis when discussing race and class is on the later colonial period. Emphasizing the years following the late-1600s allows historians to analyze either a more defined racial system or a more mature economic class system. Within this period, historians examine both rural and urban settings, often focusing on one region or city in order to engage in a case study from which they can draw much broader conclusions about society as a whole. The difficulty of dealing with the history of colonial Mexico is that records are often sparse and from only one perspective, the Spanish perspective. Records, also, are inconsistent from year to year, even when discussing the same region or individual. It is difficult to delve deep into both the Afro-Mexican and indigenous communities because Spaniards, mostly religious or political officials, kept the records. Also, witnesses' testimonies were biased; often witnesses presented information based on who they were talking to. Witnesses wanted their testimony to appeal to the audience they were addressing in order to avoid punishment or obtain privilege.<sup>3</sup> Therefore, there is a limit to how much one can understand about the true workings of colonial Mexican society from the sources available.

Another difficulty in using colonial Mexican documents deals with the definitions of different racial groups. In both rural and urban communities, there was a varied racial spectrum. The three defining racial groups were Spaniards, Indians, and Afro-Mexicans. However, because of interracial unions among all three groups, there were also varying degrees of *castas*; "humans are able to mate across all races and have done so throughout history, creating an enormous variety of human genetic inheritance."<sup>4</sup> Often *casta* terms were used differently in different regions of colonial Mexico. Therefore, each historian begins their work with definitions of how they plan to use *casta* terms. For example, what racial makeup is a *mulatto* or *mestizo*? Clarity of definition is imperative to a persuasive argument.

Evaluating those authors who argue that race was the most important factor in identity construction and social stratification; one must first understand what race is. The Dictionary of Social Sciences defines race as, "a classification of human beings into different categories on the basis of their biological characteristics. There have been a variety of schemes for race based on

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<sup>3</sup> Patrick Carroll, "The Scholarly Debate Over the Social Significance of Race v. Class in Eighteenth Century Mexico," In *New Spain's Social Trinity* (Austin: University of Texas Press, forthcoming 2009), 1-2.

<sup>4</sup> Robert Drislane and Gary Parkinson. "Online Dictionary of the Social Sciences." <http://bitbucket.icaap.org/> (Accessed 12 December 2008).

physical characteristics.”<sup>5</sup> Furthermore, in colonial Mexico, Spanish officials, hoping to privilege Spaniards over everyone else, defined race according to their *sistema de las castas*, not only assigning a racial categorization to each individual but also ranking racial categories. The *sistema de las castas* “first defined ‘otherness’ on the basis of visible and inherited physical characteristics, or phenotype...The second strategy attached significance to racially based identity in the distribution of power or privilege.”<sup>6</sup> Spaniards attempted to impose this racial order upon society. Spaniards elevated themselves to the highest status and demoted Indians to the lowest; Afro-Mexicans fell somewhere in the middle. The more Spanish blood an individual had, the higher an individual’s ranking within the *sistema de las castas* and the greater access one had to privilege. The difficulty of defining an individual’s race has already been discussed. However, it is important, also, to understand that perceived phenotype also influenced an individual’s position within the racial hierarchy; “the defining characteristics of race do not appear in all members of each so-called race, but merely occur with some degree of statistical frequency.”<sup>7</sup> An individual’s biological race was not always the racial category they identified as within the *sistema de las castas*.

Robert McCaa (et. al.) in his 1979 article “Race and Class in Colonial Latin America: A Critique” provides a statistical analysis of the social structure of Oaxaca in the 1790s to conclude that race defines identity construction and social stratification.<sup>8</sup> Using John Chance and William Taylor’s data, McCaa (et al.) finds short comings in their analysis and argues that their article has methodological flaws. McCaa (et al.) evaluates the same marriage records as Chance and Taylor, and finds that race more often than class determined marriage partner selection. Racial endogamy was the norm. McCaa (et al.) concludes “that race remained a strong principle of social stratification even in the relatively commercial and proto-industrial economy of colonial Oaxaca.”<sup>9</sup> Using a better statistical method, McCaa (et al.) sees change through broad structural conditions. Moreover these changes can only be understood by evaluating the margins of society to define the center. McCaa (et al.) criticizes Chance and Taylor for ignoring those groups of

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<sup>5</sup> Drislane and Parkinson, “Race”.

<sup>6</sup> Carroll, “Negotiating Privilege Across New Spain’s Social Trinity,” 2.

<sup>7</sup> Drislane and Parkinson, “Race”.

<sup>8</sup> Robert McCaa, Stuart Schwartz and Arturo Grubessich. “Race and Class in Colonial Latin America: A Critique.” *Comparative Studies in Society and History*, vol. 21, no. 3 (July, 1979): 422.

<sup>9</sup> McCaa, Schwartz, and Grubessich, 433.

people on the periphery of society. By using a Cliometric approach, McCaa (et al.) seeks to control the human experience through evaluation of evidence. Predictability defines progress.

Herman Bennett in *Africans in Colonial Mexico* presents a social history of absolutism, analyzing institutions in Mexico City from a black slave perspective.<sup>10</sup> Institutions in colonial Mexico allowed Afro-Mexicans to construct a shared beliefs system. Bennett argues that Afro-Mexicans understood the different types of authority which ruled their lives: the Catholic Church, the Spanish government, and their masters. Each authoritarian group had their own agenda and goals. Therefore, Afro-Mexicans created conflicts of interest between the three groups, pitting one master against another. Slaves sought certain rights, such as control over their bodies and their time. One of Bennett's major contributions is the argument that the slave experience was fluid; therefore the slave's shared experience defined them racially and allowed slaves to construct their identity based on their community. Blacks maintained social ties over great distances of time and space. On a daily basis, Afro-Mexicans negotiated privilege by understanding the conflicting goals of their masters, choosing which goal led to the greatest privilege, and then using their community strength to negotiate privilege. The greater familiarity Afro-Mexicans had with Spanish culture and mores, the greater amount of privilege they obtained.

Bennett views African slaves as active participants in colonial Mexican society. Therefore, he argues that Africans were more than just slaves. He gives a voice to the voiceless and argues that Africans did not simply obey their masters and passively assimilate into Spanish culture. Because the Spanish viewed blacks as rational beings, Afro-Mexicans exercised their humanity with a greater amount of agency. A cultural hybrid emerged where African learned to speak Spanish and converted to Christianity as a process of negotiating privilege. They sought greater equality.

Like Bennett, Ben Vinson III also looks at institutions in colonial Mexico, but he focuses more specifically on the free black militia in Veracruz and Puebla. By using the free black militia to view society as a whole, Vinson argues that race ultimately determined identity construction and social stratification. The free black militia was a racial distinction, yet within the free black militia, distinctions were made by social status and economic class. Vinson argues

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<sup>10</sup> Herman Bennett, *Africans in Colonial Mexico*. (Bloomington: University of Indiana Press, 2003).

for a qualified race. *Bearing Arms for His Majesty* shows how blacks overturned the dis-privilege of the *sistema de las castas*.<sup>11</sup> Free blacks within the militia used the *sistema de las castas* to obtain privilege by embracing and celebrating their racial identity.

Furthermore, free black soldiers brought about positive change through a unified embrace of their racial identity. Not only were soldiers able to obtain privilege for themselves and their families but for whole communities of Afro-Mexicans. Free black soldiers sought privilege within the broader Spanish society and they leveraged state and local officials to their advantage. Those communities who most benefited from militia service occupied areas of colonial Mexico with the greatest population density, mostly urban areas. Vinson concludes by arguing that race unified Afro-Mexicans. They used a racist social order to obtain privilege through an institution. They constructed their identity based on race, turning the *sistema de las castas* on its head. However, Vinson makes it clear that there were limits to the degree of privilege and social status gained. Often free black militiamen were the first among unequals.

Within the race argument of the debate emerges the question: does ethnicity characterize identity construction and social stratification and if so, what role does ethnicity play and how is ethnicity related to race. The Dictionary of Social Sciences defines ethnic identity as, “an individual's awareness of membership in a distinct group and of commitment to the group's cultural values.”<sup>12</sup> Ethnicity is different than race; “it implies that values, norms, behavior and language, not necessarily physical appearance, are important distinguishing characteristics.”<sup>13</sup> Within the race argument of the debate, Laura Lewis, Susan Kellog and Norma Angelica Castillo Palma discuss ethnicity. Although all three authors argue that ethnicity plays an important role in defining social processes, the role of ethnicity is within the framework of race. They privilege race, either in their analysis or through the evidence chosen.

In *Hall of Mirrors*, Laura Lewis provides a much more complex argument than previously seen by not only discussing race and economic class but also ethnicity.<sup>14</sup> Lewis attempts to dissolve the race versus class debate by fusing race and class together, claiming the distinction has been exaggerated. Lewis argues that two power domains actually existed in

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<sup>11</sup> Ben Vinson III, *Bearing Arms for His Majesty: The Free-Colored Militia in Colonial Mexico*. (Stanford: Stanford University Press, 2001).

<sup>12</sup> Drislane and Parkinson, “Ethnic Identity”.

<sup>13</sup> Drislane and Parkinson, “Ethnic Group”.

<sup>14</sup> Laura Lewis, *Hall of Mirrors: Power, Witchcraft, and Caste in Colonial Mexico*. (Durham: Duke University Press, 2003).

colonial Mexico. Spaniards dominated the first power domain, the sanctioned domain. Therefore, race determined identity construction and social stratification. Indians held authority in the second power domain. In this unsanctioned domain, ethnicity determined identity construction and social stratification. Lewis also outlines a social pyramid that existed in colonial Mexico. Spaniards occupied the top of the social pyramid with Afro-Mexicans in the middle and Indians at the bottom. However, in certain situations, Indians were able to invert the social pyramid, placing themselves in a position of power and privilege. In discussing these two power domains and the different social hierarchies, Lewis analyzes gendered language: Indians were feminized and women were Indianized. Lewis argues that within Spanish society, Indians and women were viewed as weak and child-like, while Spaniards were viewed as strong and masculine.

As a historical anthropologist, Lewis takes a different approach towards primary sources. She looks at what can be implied from the sources, deconstructing what was actually said. Because Lewis views colonial Mexican society as divided into two power domains, dialectic between the power domains brought about change. Afro-Mexicans served as mediators in both social structures. Lewis defines progress as cultural balance and harmony brought about by dialectic. Lewis' attempt to dissolve the debate fails. Though she implicitly implies that ethnicity plays a role in identity construction and social stratification, Lewis privileges race, giving the greater consideration to the Spanish led domain of power.

Susan Kellogg and Norma Angelica Castillo Palma directly address ethnicity. Their article, "Conflict and Cohabitation between Afro-Mexicans and Nahuas in Central Mexico," broadens the race versus class debate with the introduction of ethnicity.<sup>15</sup> Though they analyze society within the Indian sphere of influence in Cholula, Kellogg and Castillo Palma use official Spanish records. Often the accounts used were tainted by Spanish record keepers. Afro-Mexicans and Indians provided testimony for a Spanish audience. Therefore, though ethnicity determined identity construction and social stratification in Indian society, race was also an important factor because of Indians and Afro-Mexicans' forced interaction with Spanish officials.

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<sup>15</sup> Angélica Castillo Palma and Susan Kellogg. "Conflict and Cohabitation between Afro-Mexicans and Nahuas in Central Mexico." In *Beyond Black and Red*. Edited by Matthew Restall. (Albuquerque: University of New Mexico Press, 2005), 132.



Contributing something new to the debate, “Conflict and Cohabitation between Afro-Mexicans and Nahuas in Central Mexico” is a revisionist history. Traditionally, Afro-Mexican and Indian relations have been seen as hostile. Looking at intermarriage and the importance of kinship, Kellogg and Castillo Palma argue that in fact, there was a balance of conflict and harmony between Indians, blacks, and *castas*: “there is ample evidence of positive relationships. When conflict arose, these grew often out of social closeness, not from distance.”<sup>16</sup> This argument is unique because it offers an alternative argument to the traditional viewpoint without completely revising the historical analysis. They agree that conflict did occur between Indians and Afro-Mexicans, that these accounts dominate the historical record, and that when conflict warranted the attention of the authorities, racial identity emerged as an argument for or against punishment. However, Kellogg and Castillo Palma call to attention that just because harmonious relationships were not recorded does not mean they did not exist.

Concluding those authors who argue that race was the most important characteristic in constructing identity and negotiating privilege, J. I. Israel’s *Race, Class, and Politics in Colonial Mexico* offers a socio-political interpretation which focuses on Mexico City, the vice regal capital, from 1610 to 1670.<sup>17</sup> Israel argues that race dominated life in colonial Mexico; however he also looks at how racial classifications were often complex and complicated. Israel evaluates a population of growing racial diversity which places stress on the Spanish government. A major contribution of Israel is that he looks at minority populations which have normally been ignored in colonial Mexico, including Italians, Jews, Portuguese, Basques, and Asian populations. Looking at a variety of minority populations and a growing number of intermarriages, Israel argues that there were growing social and political tensions in Mexico City. The *casta* population complicated the Spanish *sistema de las castas*. These tensions led to conflict among leading Spanish authorities, especially official government authorities and the clergy. Figures in power, both secular and religious, struggled to maintain their authority. Israel looks at how they reacted to economic crises, labor shortages, and the growing *casta* population. Just as the elite class in colonial Mexico struggled to maintain order, Israel desires to construct order in his telling of history.

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<sup>16</sup> Castillo Palma and Kellogg, 116.

<sup>17</sup> J.I. Israel, *Race, Class and Politics in Colonial Mexico*. (London: Oxford University Press, 1975).

Evaluating those authors who argue that economic class was the most important factor in identity construction and social stratification, one must first define economic class. According to the Dictionary of Social Sciences, class is “a group of individuals sharing a common situation within a social structure, usually their shared place in the structure of ownership and control of the means of production.”<sup>18</sup> Historians within the debate focus on the economic aspects of class, “a shared characteristic relevant in some socio-economic measurement or ranking.”<sup>19</sup> Moreover, in colonial Mexico, class was directly related to wealth and power. A higher economic class rank allowed an individual to wield more power and obtain greater privilege.

Two of the most influential historians within the debate, John Chance and William Taylor, argue that economic class determined identity construction and social stratification. In their 1977 article, “Estate and Class in a Colonial City: Oaxaca in 1792,” Chance and Taylor look at the 1792 census conducted by the Spanish military.<sup>20</sup> Because the census omits Indian populations, Chance and Taylor supplement their research with parish records which did include Indian populations. They attack the race interpretation of colonial Mexico, viewing race and the estate system as fixed conditions. For Chance and Taylor, the growing industrialization and the emergence of capitalism brought about change over time. People constantly sought advantage through economic means. Therefore, an economic class system replaced the estate system in colonial Mexico.

In Oaxaca and Antequera, supply and demand drove commercial trade which led to the evolution from the estate to the class system. Capitalism developed. With the emergence of capitalism, race no longer determined an individual’s place within the social hierarchy. One could become upwardly mobile through economic means. Therefore, the weakening of the caste system and the emergence of capitalism defined progress in colonial Mexico. Chance and Taylor are among the first historians to make an economic class argument, providing the foundation for future class arguments. Although McCaa (et. al.) criticizes their methods, Chance and Taylor spawned a great deal of historiographical discourse which furthers the argument that economic class defined social process.

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<sup>18</sup> Drislane and Parkinson, “Class”.

<sup>19</sup> Drislane and Parkinson, “Class”.

<sup>20</sup> John Chance and William Taylor. “Estate and Class in a Colonial City: Oaxaca in 1792.” *Comparative Studies in Society and History*, vol. 19, no. 4 (October, 1979): 455.

Drawing from Chance and Taylor's argument, Rodney Anderson argues that colonial Mexico did move away from the estate system to a class system. His 1988 article, "Race and Social Stratification: A Comparison of Working-Class Spaniards, Indians, and *Castas* in Guadalajara, Mexico, in 1821," provides a statistical evaluation of the significance of race and class, looking specifically at Guadalajara.<sup>21</sup> Through a census analysis, Anderson concludes that class is more significant. However, he takes the argument a step further. Anderson argues that race and class will eventually be integrated, that the development of a class system or capitalism is only the beginning. Anderson is a Marxist historian; class will dissolve, like race, as a determining factor in identity construction and social stratification. However, this manifestation is not apparent in colonial Mexico in 1821; economics dominated society.

Responding to Chance and Taylor, Patricia Seed adds a new epistemology to the debate in "The Social Dimensions of Race: Mexico City."<sup>22</sup> Looking at the 1753 census which included Indian populations, Seed focuses on Mexico City, arguing that Mexico City represented greater colonial Mexican society as a whole. Mexico City's diversity allows for broad assumptions to be tested and broad patterns to be seen. With a new epistemology, Seed clouds the debate with labels. She argues that race is based on perceptions and not inherited, therefore, not physical. Social circumstances and an individual's relationship to the division of labor define social race. Much like Bennett's shared experiences, social race "was related to the combination of physical appearance, economic status, occupation, and family connections, in other words, to his overall socioeconomic position."<sup>23</sup> However, unlike Bennett, Seed does not emphasize social circumstance and identity based on community, but emphasizes socio-economic status in relation to one's place in the division of labor.

Seed looks to the past to understand the future. Seed argues that the historian exposes the processes of social and economic change, which define identity construction and social stratification. Because rank in society is linked to the division of labor, or occupation, there is racial variability. An individual can overcome racial classification through economic means. For Seed, the division of labor empowers people in colonial Mexico. Therefore, greater social

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<sup>21</sup> Rodney Anderson, "Race and Social Stratification: A Comparison of Working-Class Spaniards, Indians, and Castas in Guadalajara, Mexico, in 1821." *Hispanic American Historical Review*, vol. 68, no. 2 (1988): 209-210.

<sup>22</sup> Patricia Seed, "The Social Dimensions of Race: Mexico City." *Hispanic American Historical Review*, vol. 62, no. 4 (1982): 574.

<sup>23</sup> Seed, 574.

equality defines progress. Under Seed's interpretation, colonial Mexican society is much more inclusive. She evaluates more than economic factors, looking also at racial, religious, and gender variables. Within the debate, Seed is one of the first historians to discuss women and children in colonial Mexico, furthering the inclusiveness of her historiographical approach to the debate. This addition is important to moving the debate forward.

R. Douglas Cope's book title, *The Limits of Racial Domination*, eloquently defines his debate position.<sup>24</sup> For Cope, racial domination ended early in colonial Mexican history. Carroll summarizes Cope's argument "that as a result of the imprecision of and the contestation over racial identity that as time progressed class became the only meaningful social marker of identification and tool for class ranking."<sup>25</sup> Society quickly evolved from the Indian and Spanish republics to the *sistema de las castas* which then became dysfunctional; therefore a class based society emerged. The Spanish created the *sistema de las castas* to privilege whites and distance themselves from blacks and *castas*. However, Cope argues that the *sistema de las castas* does not work because of racial mixing. Spaniards defined race by phenotype out of a functional purpose, but as races mixed together, phenotypes blurred. Therefore, colonial Mexican society evolved into a more functional society and culture based on economic differentiation.

Presuming that the *sistema de las castas* should be most evident in the urban centers, Cope focuses on the *traza* to frame his political and social inquiry. In colonial Mexico, the *traza* was at the center of town, much like a town square, where presumably the most elite members of society lived. Upon evaluating the *traza*, Cope finds the emergence of a plebian society based on residential patterns. Cope attempts to reframe the debate as a struggle between elites and plebeians of all racial categories. Because all races interacted daily in the *traza*, people negotiated race based on who they were talking to, emphasizing what racial categorization would privilege them most in a certain situation. Because race was negotiable, the influence of race comes into question. Much like Seed, Cope argues that occupation, or an individual's relationship to the division of labor gave *castas* power in determining their identity and social stratification. Upwardly mobile *castas* challenged the *sistema de las castas*. However, though economics allowed *castas* to obtain some privilege, plebeians were only able to become the first among unequal's, much like Vinson's free colored militiamen.

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<sup>24</sup> R. Douglas Cope, *The Limits of Racial Domination*. (Madison: University of Wisconsin Press, 1994).

<sup>25</sup> Carroll, "The Scholarly Debate Over the Social Significance of Race v. Class in Eighteenth Century Mexico," 6.

One of Cope's greatest contributions to the debate is a very thorough analysis of the Mexico City Riot of 1692. He evaluates black and Indian relations. The Riot of 1692 briefly turns the Spanish social order upside down. There was a plebian mentality with no evidence of racial divisions among *castas*, blacks, Indians, and even poor Spaniards. For Cope, the Riot of 1692 is a triumph for class.

Also using the elite and plebian distinction, Richard Boyer's *Lives of the Bigamists: Marriage, Family, and Community in Colonial Mexico*, focuses on plebian society in colonial Mexico from the mid-sixteenth century to the late eighteenth century.<sup>26</sup> Looking at the institution of marriage, Boyer evaluates patriarchy and male domination in relation to economic class. Boyer finds that economic class, not race influenced social mores. Different classes held different social mores. Lower classes were more likely to enter unhappy marriages because they were forced to marry younger than the upper classes. Unhappy marriages led to bigamy, mostly practiced by men. Once a man became economically self-sufficient, even if he was poor, and more mature, he desired to marry a woman of his choice, not someone he had been socially pressured into marrying. Because divorce was illegal in colonial Mexico, these men saw the only solution to be bigamy. It was a question of control and choice. No longer in a society dominated by race, a factor out of their control and choice, men not only wished to control their economic situation but other aspects of their lives, as well. The central characteristic of colonial Mexican society was a highly patriarchal and male dominated social system, which determined the actions of both men and women.

Boyer is the first to use Inquisition records of bigamists as a window into the social structure of colonial Mexico. When brought before the Inquisitors, bigamists were not told what they were accused of; they were only asked to relate their life stories. Then, the process ended with reconciliation. The best example of this process is Boyer's detailed analysis of the González case.<sup>27</sup> Boyer evaluates González's childhood and his daily married lives. Boyer concludes that men dominated the social structure but that among men, economic class was a defining factor in this patriarchal structure. So although men dominated women, men with more money were higher in the social order regardless of race. Economic means gave some men power, privilege, and prestige over other men. Boyer uses bigamist marriages as a reference

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<sup>26</sup> Richard Boyer, *Lives of the Bigamists: Marriage, Family, and Community in Colonial Mexico*. (Albuquerque: University of New Mexico Press, 1995), 2-5.

<sup>27</sup> Boyer, 13-15.

point for viewing society as a whole. Within the lives of bigamist, economic class dominated identity construction and social stratification; therefore economic class also must have defined society as a whole.

Adding to the debate, Cheryl English Martin looks at labor relations in Chihuahua, a silver mining region, throughout the eighteenth century in her book, *Governance and Society in Colonial Mexico*.<sup>28</sup> Chihuahua consisted of people of every race: blacks, Indians, *castas*, and Spaniards, who interacted on a daily basis, and therefore can be viewed as representative of colonial Mexico as a whole. English Martin examines the dynamics of social interaction on a variety of levels, including economic class, political subordination, gender and ethnicity. She also looks at how these factors effected the negotiation of privilege. As one of her primary contributions, English Martin broadens the perspective of the debate to include questions of not just economics, race and politics, but also gender and ethnicity. English Martin argues that people moved into Chihuahua specifically to escape the limits of race and to seek better economic opportunities.<sup>29</sup> Important to this social negotiation was the constant turnover of people of all social and racial classes, which led to the negotiation process being repeated over and over again.

Spanish racial domination failed in Chihuahua. Because of a scarcity of labor, an individual's place within the division of labor replaced race as the determining factor in identity construction and social stratification.<sup>30</sup> In addition, Chihuahua's isolation minimized race and the Spanish social order. Spanish elite authorities attempted to impose order upon society; however they failed because the lower classes negotiated power and privilege through means other than race. The only overarching aspect of control which remained was patriarchy not defined by race but by gender and economic class. Within Chihuahua's patriarchal society, beyond economic class, honor defined the negotiation of privilege.<sup>31</sup> A sense of honor led men of all classes to fight for an improved social status.

Concluding the economic class argument of the debate, Colin M. MacLachlan and Jaime E. Rodríguez O.'s *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico* seeks to synthesize colonial Mexican history and therefore examines Mexican history from pre-

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<sup>28</sup> Cheryl English Martin, *Governance and Society in Colonial Mexico*. (Stanford: Stanford University Press, 1996), 6-8.

<sup>29</sup> English Martin, 45-46.

<sup>30</sup> Ibid., 62.

<sup>31</sup> Ibid., 125-127.

Colombian times to independence.<sup>32</sup> This very ambitious work mostly focuses on central Mexico because of its dense population. They argue that economic class determined identity construction and social stratification. They also argue that not only does the influence of race weaken, but racial categories merge to form something entirely new.<sup>33</sup>

MacLachlan and Rodríguez conclude that Mexican society was neither Spanish nor Indian, but that a new *mestizo* society emerged.<sup>34</sup> This merging of Indian and Hispanic social, cultural, intellectual, and economic views was a dominant force in colonial Mexico, determining how people identified themselves and how they negotiated privilege. The emergence of a new *mestizo* society is a very convincing argument and one of MacLachlan and Rodríguez O.'s main contributions to the debate. Colonial Mexican society neither resembled Spanish nor Indian society. There was no distinct separation of peoples, like in the colonial United States, but a daily interaction of cultures. Also, an integrated economic system, capitalism, emerged, which led to a class based society. MacLachlan and Rodríguez's argument is instructive in analyzing modern Mexican society, as well.

Though the debate surrounding identity construction and social stratification traditionally has been defined in terms of race or economic class, more recently scholarship has created unique debate positions. These unique debate positions, which broaden the perspective beyond race or class, constructively move the debate forward. Historians are asking new questions.

One such historian, John Tutino in his forthcoming book, *Making a New World: Forging Atlantic Capitalism in the Bajío and Spanish North America*, argues that patriarchalism defines identity construction and social stratification.<sup>35</sup> Building off the economic class argument, Tutino qualifies class linking it to the structure of patriarchy. For example in Salamance, Salvatierra, and Valle de Santiago, "consolidated commercial agricultural societies ruled by entrepreneurs in search of profit and worked by people of Mesoamerican and African ancestry – all orchestrated by patriarchy," emerged.<sup>36</sup> Though past historians have recognized the existence of a patriarchal society, Tutino focuses on patriarchy as the central defining characteristic of colonial Mexican society. Tutino looks at patriarchy in both the workplace and the home. The

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<sup>32</sup> Colin M. MacLachlan and Jaime E. Rodríguez O. *The Forging of the Cosmic Race: A Reinterpretation of Colonial Mexico*. (Berkeley: University of California Press, 1980), 2.

<sup>33</sup> MacLachlan and Rodríguez, 3.

<sup>34</sup> MacLachlan and Rodríguez, 217.

<sup>35</sup> John Tutino, "Making a New World: Forging Atlantic Capitalism in the Bajío and Spanish North America." (Currently under publication review at Duke University Press, 2009).

<sup>36</sup> *Ibid.*, 16.

Spanish colonial system made men producing patriarchs. Only men could provide a living wage and substance by their near exclusive access to the means of production; therefore women and children became subservient, living and working under their patriarchs.<sup>37</sup> Yet because of the growing commercial economy, male laborers also served a patriarch: the land, mine, or shop owner. By allowing themselves to become dependants at work, men “solidified patriarchal rule in producing households.”<sup>38</sup> Both environments resulted in parallel conclusions that male authority regulated life in colonial Mexico, creating a vertical power structure.

However, Tutino concludes that profit undermined patriarchy. In the Bajío, the rise of capitalism brought about the decline of patriarchy, and what emerged was “a society recognizably capitalist – driven by profit, integrating diverse peoples in a variety of social relations.”<sup>39</sup> In this volume, Tutino does not fully explore the decline of patriarchy; it is a conclusion he hopes to explore in a later volume. Therefore, the focus of *Making a New World: Forging Atlantic Capitalism in the Bajío and Spanish North America* is on the social relationships within production. In the workplace, men mined silver, tended crops, or did other skilled jobs in order to maintain their household where women and children labored to maintain gardens, produce meals, and sustain the home. In both the workplace and the household, a male figure of authority profits from others’ work. In conclusion, a profit driven economy was linked to a social structure of patriarchy in the Bajío.

Steve Stern is one of the first historians to introduce gender into the debate. In his socio-political history, *The Secret History of Gender*, Stern evaluates how the intersection of race, class, and gender effect identity construction and social stratification.<sup>40</sup> Stern explores the gendered language of politics in colonial Mexico. Masculinity was associated with race and class. Power, honor and superior masculinity were more accessible to elite man, “placing subaltern men in structural positions of femininity vis-à-vis their superiors, and by subjecting subaltern men to open taunts of their manhood.”<sup>41</sup> Femininity was a sign of weakness but it was also associated with a lower economic status. Spanish elite justified their authority through the language of superior masculinity, through the language of gender. However, within a subaltern

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<sup>37</sup> Tutino, 20.

<sup>38</sup> Ibid.

<sup>39</sup> Ibid., 2.

<sup>40</sup> Steve Stern, *The Secret History of Gender: Women, Men, and Power in Late Colonial Mexico*. (Chapel Hill: University of North Carolina Press, 1995).

<sup>41</sup> Stern, 167.



context, men reaffirmed their masculinity, constructing positive images of their manhood and participating in actions which would bring them honor.

Looking at the negotiation of power between men and women, Stern finds that women do not challenge the social structure of patriarchy but they challenge the patriarch, themselves; “subaltern women and men engaged in bitter, sometimes violent struggles over gender right and obligation, and developed distinctive and contending models of legitimate gender authority.”<sup>42</sup> Women in colonial Mexico felt men had certain obligations and therefore, patriarchy was contingent on the fulfillment of those obligations. Men were responsible for providing economic support. Women used these responsibilities of patriarchy to negotiate power in order to obtain stability. Tearing down stereotypes of colonial Mexican women, Stern argues that though women were subordinate, they sought to actively better their lives, often challenging the misuse of male authority.

Patrick Carroll introduces another unique debate position. Carroll introduces the idea of multiple social orders. Carroll argues that identity construction and social stratification operated differently in different social spaces. Carroll identifies three distinct social spaces: Spanish, *casta*, and Indian social space. Race defines identity construction and the negotiation of privilege in Spanish social spaces; economic class defines identity construction and the negotiation of privilege in *casta* social spaces; and ethnicity defines identity construction and the negotiation of privilege. Carroll argues that “whites did manage to achieve moderate success in social spaces they dominated, most notably urban core areas, and patches of Spanish influence within rural pueblos and estates. Yet whites’ control over local record keeping exaggerated their ability to implement the *sistema de las castas*.”<sup>43</sup> In reality, three distinct, yet parallel, social structures existed.

Carroll focuses on the Afro-Mexican populations of colonial Mexico in Veracruz and Puebla. Looking at colonial Mexican society from the margins, Carroll concludes that there was no overarching social structure. When looking at how an individual defined identity construction and social stratification, the historian must ask the question, who was the individual negotiating privilege with. For example, “Afro-Mexicans’ marginalization, like that of many indigenous peoples and poor whites, forced them to contest their identity and *calidad* in an ongoing quest for

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<sup>42</sup> Ibid., ix.

<sup>43</sup> Carroll, “The Scholarly Debate Over the Social Significance of Race v. Class in Eighteenth Century Mexico,” 6-7.

privilege.”<sup>44</sup> Depending on which social space an individual sought privilege in, determined how identity was constructed. If an individual sought privilege in a Spanish social space, they would attempt to pass as a racial classification higher on the pyramid of the *sistema de las castas*; however, if the same individual sought privilege in a *casta* social space, they would emphasize their economic status. Afro-Mexicans were more likely to negotiate privilege in all three social spaces and therefore, exemplify the existence of three distinct social orders. Looking at colonial Mexican society from the margins allows Carroll to see the outlines of society as a whole.

Presenting the last unique position within the race versus class debate, Juliana Bara looks at Spanish-Indian relationships in Northern Mexico and Texas between 1680 and 1780. Looking at a region dominated by Indians, *Peace Came in the Form of a Woman* argues that kinship was the foundation of Spanish-Indian relations.<sup>45</sup> Neither race nor class determined the negotiation of political or economic privilege in this frontier region. Furthermore, though ethnicity generally defined identity construction and social stratification, Bara takes the ethnicity argument one step further, looking specifically at the role of kinship within ethnicity. Kinship differs from ethnicity in that marriage ties complicate ethnicity. If a Spaniard wished to negotiate privilege, he not only had to assimilate into Indian culture, becoming a part of their ethnic group, but he also had to marry into an Indian family.<sup>46</sup>

Both Spaniards and Indians defined kinship in gendered terms. Bara focuses on the diplomacy of gender, where Indian women negotiated peace and therefore were figures of authority. Spanish power did not reach the frontier of northern Mexico and southern Texas; “Native Americans construction of social order and of political and economic relationships – defined by gendered terms of kinship – were at the crux of Spanish-Indian politics.”<sup>47</sup> The Spanish entered a region of Indian dominance, where the *sistema de las castas* had no influence. Spaniards were not accustomed to dealing with women in authority, yet they had no choice. For the first time, they were in a position of disadvantage. Bara challenges the boundaries of the debate both by her regional choice and her examination of women in positions of authority.

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<sup>44</sup> Ibid., 20.

<sup>45</sup> Juliana Bara, *Peace Came in the Form of a Woman*. (Chapel Hill: University of North Carolina Press, 2007), 7.

<sup>46</sup> Bara, 69-70.

<sup>47</sup> Ibid., 2.

Upon considering the evidence and past historiography, this essay concludes that both patriachalism and social race defined identity construction and social stratification in colonial Mexico. Tutino provides a convincing argument for the presence of a patriarchal system. The rise of capitalism affected this patriarchal system and these two social structures dominated all aspects of society. Patriarchalism determined men and women's actions in the home, at work, in politics, and in religion. As evidence of the strength of his argument, Tutino's regional choice of the Bajío shows the depth of Spanish imperial influence. Selecting a region on the growing frontier, the Bajío was far enough from the center of Spanish influence, Mexico City, to form its own distinct society and culture. Yet still, a patriarchal hierarchy emerged within an economic system of capitalism.

Moreover, social race in the form of shared experiences more clearly defines colonial Mexican society. Communities formed around shared experiences, and identity construction and social stratification played a crucial role within these shared experiences. Race is more than just phenotype or physical appearance; social race emerges as a melding of family, economic status, daily interactions and associations, politics and religion. Those members of a social race, of a community, shared the everyday struggles of identifying with those aspects of life which make up social race. A more homogeneous culture existed in colonial Mexico than most historians argue for. Relating to those who one shares a life with, those who one encounters on a daily basis and shares struggles with, is a natural human condition. With his explanation of shared experiences, Bennett defines natural human tendencies which can be applied to almost any community, not just colonial Mexico.

In conclusion, the race versus class debate within colonial Mexican historiography is decidedly moving away from a traditional definition of race. Those historians who still argue for the influence of race define race as negotiated. Colonial Mexican society no longer can be viewed in the rigid terms of the *sistema de las castas*. If arguing that race did influence identity construction and social stratification, it is an argument for a qualified race. The economic class debate also is evolving. The argument that economic class defined identity and construction and social stratification is becoming the foundation for other arguments. Historians are not disregarding economic class but linking it to other aspects of society, such as gender, religions, marriage, shared experiences, and social spaces. Also, a third explanation emerges, ethnicity. Does race, class, ethnicity or something else ultimately define identity construction and social

stratification in colonial Mexico? Many historians are moving the debate forward, but much work is left to be done. Ultimately, historians should look at the processes of identity construction and social stratification beyond colonial Mexican history. For each society in history participates in these processes.